



California Department of Consumer Affairs
BUREAU OF AUTOMOTIVE REPAIR

WRITE IT RIGHT

A Guide for the Auto Repair Dealer

CALIFORNIA DEPARTMENT OF CONSUMER AFFAIRS

Bureau of Automotive Repair

The DCA/BAR field offices listed at right are open from 8 AM to 5 PM Monday through Friday (except state holidays).

We at DCA wish you every success in your auto repair business. If we can help you in any way, please contact us.

For further information . . .

- Read BAR's quarterly newsletter, the *Repair Reporter*.
- Consult the booklet *Laws and Regulations Relating to Automotive Repair Dealers, Licensed Official Stations, and Licensed Smog Check Stations (Laws and Regulations)*.
- Call DCA's toll-free information line at 1-800-952-5210.
- Visit BAR's website at www.smogcheck.ca.gov.

BAR FIELD OFFICES

Bakersfield

4801 District Blvd., Bakersfield, CA 93313 (805) 833-6304

Canoga Park

6800 Owensmouth Ave. #400, Canoga Park, CA 91303 (818) 596-4400

Culver City

6035 Bristol Parkway, Culver City, CA 90230 (310) 410-0024

Fresno

4124 W. Swift Ave., Suite 101, Fresno, CA 93722 (209) 445-5015

Fullerton

1561 E. Orangethorpe Ave., Suite 220, Fullerton, CA 92631 (714) 680-7851

Hayward

21041 Alexander Court, Hayward, CA 94545 (510) 785-1961

Oceanside

1310 Union Plaza Court, Suite 100, Oceanside, CA 92054 (760) 439-0942

Riverside

3737 Main St., Suite 850, Riverside, CA 92501 (909) 782-4250

Sacramento

10220 Systems Parkway, Suite D, Sacramento, CA 95827 (916) 255-4200

San Jose

1361 S. Winchester Blvd., Suite 206, San Jose, CA 95128 (408) 277-1860

South El Monte

1180 Durfee Ave., Suite 120, South El Monte, CA 91733 (626) 575-6934

Write it Right!

The 1971 Automotive Repair Act requires auto repair shops to follow sound business practices in dealing with customers. These practices can be summed up in four rules:

- **Keep the customer informed.**
- **Do only work that has been authorized by the customer.**
- **Keep a written record of all work performed.**
- **Give copies of work orders and invoices to the customer.**

It is your responsibility to comply with the Automotive Repair Act.

This booklet, which illustrates how to complete work orders and invoices correctly, is intended as a guide to help you meet that responsibility. It is not a comprehensive list of the laws and regulations governing auto repair.

This information should be used in conjunction with the booklet *Laws and Regulations Relating to Automotive Repair Dealers, Licensed Official Stations, and Licensed Smog Check Stations*.

Protect yourself. If a dispute arises, you may be asked to show that repairs were authorized.

State of California
Gray Davis, *Governor*

Aileen Adams, *Secretary, State and Consumer Services Agency*
Kathleen Hamilton, *Director, Department of Consumer Affairs*

Contents

Written Estimate/Work Order	4
Additional Authorization	5
Final Invoice	6
Acknowledgment of Notice and Consent	7
Estimate To Tear Down, Inspect, Report, and Reassemble	8
Second Estimate After Teardown	9
Final Invoice After Teardown, Inspection, and Repair	10
Itemized Estimate	11
Revising an Itemized Estimate: Final Invoice	12
“Unusual Circumstances” Work Order	13
Automatic Transmission Repair	14
Automatic Transmission Repair: A Road Map To Better Understanding	16
Frequently Asked Questions & Answers	18

Publishing Information

This publication may be copied, if: (1) the meaning of the copied text is not changed or misrepresented; (2) credit is given to the Department of Consumer Affairs; and (3) all copies are distributed free of charge. In other situations, express written authorization is required.

To order an additional copy, write to the BAR Mail Room, 10240 Systems Parkway, Sacramento, CA 95827, or call (916) 255-2919 or toll-free (800) 952-5210.

Visit DCA's website at www.dca.ca.gov or BAR's website at www.smogcheck.ca.gov.

Written Estimate/Work Order

(For "Unusual Circumstances," see page 13.)

1. What must be on the work order?

The specific job, the estimated price for parts and labor, and the odometer reading. If the estimate copy is a separate document (as in the case of some computer-generated estimates), write the identification number on the final invoice. The odometer reading must be included on both the invoice and estimate. §§ 9884.9; 9884.7(1)(b)*.

2. Is the toxic waste cost included in the estimated price?

Yes. If a toxic waste charge is appropriate, it must be itemized separately on the estimate. Your toxic waste number must also be printed on your invoices if you are certified to handle toxic waste. §§ 9884.9(a); 3356.1**.

3. Does the estimated price include sales tax?

No. Tax is added when the job is done.

4. How is repair work authorized?

By the customer's signature on the work order. § 3303(j).

5. Who is the customer?

The person who brings in the car and authorizes repairs. § 3303(i).

6. What should I do with the signed paper?

Always give the customer a signed copy of the document when it is signed. Keep a copy for your records. §§ 9884.7(1)(c); 9884.11. All records must be kept for three years. § 3358.

BBB AUTO REPAIR		789-0003		No. 84500	
123 Broadway				Toxic Waste No.	
Anytown, CA 23456				CAL 000 099 999	
BAR Number AA555555				DATE 2/20/99	
CUSTOMER NAME Bill Smithfield		HOME PHONE 555-2900		BUSINESS PHONE 555-0001	
ADDRESS 176 Vine St.		VEHICLE MAKE & MODEL 1996 Ford Escort			
CITY Anytown, CA 23456		LICENSE NO. CAL123		ODOMETER 74091	
PARTS (All Parts New Unless Otherwise Noted)			LABOR		
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR		CHARGE
			Install rebuilt water pump		
			Scope engine & advise		
			Toxic waste charge		2⁰⁰
ORIGINAL ESTIMATE \$ 70⁰⁰		AUTHORIZED BY Bill Smithfield		TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN ____ DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	
PHONE #		DATE		TIME	
REVISED ESTIMATE \$		REASON		ADDITIONAL COST \$	
AUTHORIZED BY		<input type="checkbox"/> IN PERSON		DATE	
		<input type="checkbox"/> PHONE #		TIME	
				SUBTOTAL LABOR	
				\$	
				SUBTOTAL PARTS	
				\$	
				SALES TAX	
				\$	
				TOTAL	
				\$	

Additional Authorization

§§ 9884.9(a); 3353(a)

1. Can work be done in excess of the work listed on the work order?

Only if the customer first authorizes the additional work and any additional cost.

2. How is additional authorization documented?

- a. Specify on the work order the additional work and the cost.
- b. If authorization is oral, note the following on the work order:
 - Date
 - Time
 - Customer
 - Telephone number called, if any
 - Additional cost
 - Additional work
 - Note whether the customer authorized the work by phone or in person.

Additional work

Additional cost

Notation of customer authorization with telephone, date, & time

BBB AUTO REPAIR		789-0003	No. 84500	
123 Broadway		Toxic Waste No.		
Anytown, CA 23456		CAL 000 099 999		
BAR Number AA555555		DATE 2/20/99		
CUSTOMER NAME Bill Smithfield		HOME PHONE 555-2900	BUSINESS PHONE 555-0001	
ADDRESS 176 Vine St.		VEHICLE MAKE & MODEL 1996 Ford Escort		
CITY Anytown, CA 23456		LICENSE NO. CAL123	ODOMETER 74091	
PARTS (All Parts New Unless Otherwise Noted)		LABOR		
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR	CHARGE
			Install rebuilt water pump	
			Scope engine & advise	
			Engine tune-up with new:	
			• Points, plugs	
			• Condenser	
			• Distributor cap	
			Toxic waste charge	2⁰⁰
ORIGINAL ESTIMATE \$ 70⁰⁰		AUTHORIZED BY Bill Smithfield	TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN _____ DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	
PHONE #	DATE	TIME	SUBTOTAL LABOR	\$
REVISED ESTIMATE \$ 130⁰⁰	REASON Tune-up		SUBTOTAL PARTS	\$
ADDITIONAL COST \$ 60⁰⁰		SALES TAX		\$
AUTHORIZED BY Bill Smithfield		<input type="checkbox"/> IN PERSON	DATE	TIME
		<input checked="" type="checkbox"/> PHONE #	555-0001 2/25/99 11:15 am	
		TOTAL		\$

* Code numbers starting with “9” are from the Business and Professions Code of California Statutes.

** Code numbers starting with “3” are from Title 16, California Code of Regulations.

Final Invoice §§ 9884.8; 3356

1. When does the customer get the invoice?

When the repair work is finished.

2. What must be on the invoice?

- Your business name, as registered with BAR. § 3356.
- Your business address, as registered with BAR. § 3356.
- Your BAR registration number.
- Description of labor.
- Parts, itemized in terms the customer can understand. State if parts are new, used, rebuilt, or reconditioned. Parts are assumed to be new unless otherwise stated. § 3356.
- Labor and parts must be listed even if work is done at no charge. § 9884.8.
- Subtotals.
- Sales tax.
- Notations of additional authorizations. If consent is obtained by phone, you can either make notations as shown on the sample work order at right, or you can use "Acknowledgment of Notice and Consent," as explained on page 7. § 9884.9(a).

Business name & address	BBB AUTO REPAIR		789-0003	No. 84500																																																							
	123 Broadway Anytown, CA 23456		Toxic Waste No. CAL 000 099 999																																																								
Registration number	BAR Number AA555555			DATE	2/20/99																																																						
Parts itemized	CUSTOMER NAME Bill Smithfield		HOME PHONE 555-2900	BUSINESS PHONE 555-0001																																																							
	ADDRESS 176 Vine St.		VEHICLE MAKE & MODEL 1996 Ford Escort																																																								
	CITY Anytown, CA 23456		LICENSE NO. CAL123	ODOMETER 74091																																																							
	<table border="1"> <thead> <tr> <th colspan="3">PARTS (All Parts New Unless Otherwise Noted)</th> <th colspan="2">LABOR</th> </tr> <tr> <th>QTY</th> <th>DESCRIPTION OF PARTS</th> <th>PRICE</th> <th>DESCRIPTION OF LABOR</th> <th>CHARGE</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Rebuilt water pump</td> <td>25⁰⁰</td> <td>Install rebuilt water pump</td> <td>30⁰⁰</td> </tr> <tr> <td>1 set</td> <td>Points</td> <td>6⁵⁰</td> <td>Scope engine & advise</td> <td>15⁰⁰</td> </tr> <tr> <td>4</td> <td>Spark plugs</td> <td>6⁰⁰</td> <td>Engine tune-up with new:</td> <td></td> </tr> <tr> <td>1</td> <td>Condenser</td> <td>3⁵⁰</td> <td>• Points, plugs</td> <td></td> </tr> <tr> <td>1</td> <td>Distributor cap</td> <td>6²⁵</td> <td>• Condenser</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>• Distributor cap</td> <td>25⁰⁰</td> </tr> <tr> <td colspan="3">Subtotals</td> <td></td> <td></td> </tr> <tr> <td colspan="3"></td> <td>Toxic waste charge</td> <td>2⁰⁰</td> </tr> <tr> <td colspan="3"></td> <td></td> <td></td> </tr> </tbody> </table>					PARTS (All Parts New Unless Otherwise Noted)			LABOR		QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR	CHARGE	1	Rebuilt water pump	25 ⁰⁰	Install rebuilt water pump	30 ⁰⁰	1 set	Points	6 ⁵⁰	Scope engine & advise	15 ⁰⁰	4	Spark plugs	6 ⁰⁰	Engine tune-up with new:		1	Condenser	3 ⁵⁰	• Points, plugs		1	Distributor cap	6 ²⁵	• Condenser					• Distributor cap	25 ⁰⁰	Subtotals								Toxic waste charge	2 ⁰⁰				
PARTS (All Parts New Unless Otherwise Noted)			LABOR																																																								
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR	CHARGE																																																							
1	Rebuilt water pump	25 ⁰⁰	Install rebuilt water pump	30 ⁰⁰																																																							
1 set	Points	6 ⁵⁰	Scope engine & advise	15 ⁰⁰																																																							
4	Spark plugs	6 ⁰⁰	Engine tune-up with new:																																																								
1	Condenser	3 ⁵⁰	• Points, plugs																																																								
1	Distributor cap	6 ²⁵	• Condenser																																																								
			• Distributor cap	25 ⁰⁰																																																							
Subtotals																																																											
			Toxic waste charge	2 ⁰⁰																																																							
Description of labor	ORIGINAL ESTIMATE		AUTHORIZED BY	TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN _____ DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	SUBTOTAL LABOR																																																						
	\$ 70 ⁰⁰		Bill Smithfield		\$ 72 ⁰⁰																																																						
Sales tax	PHONE #	DATE	TIME	SUBTOTAL PARTS																																																							
				\$ 47 ⁷⁵																																																							
Notation of additional authorization with telephone, date, & time	REVISED ESTIMATE	REASON	ADDITIONAL COST	SALES TAX																																																							
	\$ 130 ⁰⁰	Tune-up	\$ 60 ⁰⁰	\$ 3 ⁷⁰																																																							
	AUTHORIZED BY	<input type="checkbox"/> IN PERSON DATE TIME		TOTAL																																																							
	BY Bill Smithfield	<input checked="" type="checkbox"/> PHONE # 555-0001 2/25/99 11:15 am		\$ 123 ⁴⁵																																																							

Final Invoice

(Continued from page 6)

3. How long should I keep a copy of the invoice?

For at least three years (with other records pertaining to the repair—for example, copies of parts invoices, sublet repairs, or labor). §§ 9884.11; 3358.

4. Can I sublet work to another shop? Who is responsible for it?

Yes. If you sublet work, include a statement of that fact with the written estimated price. Get the customer's consent, unless the customer cannot reasonably be notified. You are responsible for the work just as if you or your employees did it. §§ 9884.7(1)(i); 9884.9(b); 3359.

5. Do I need to provide an invoice on a “no charge” or warranty repair?

Yes. You must provide an invoice to your customer even if there is no charge. §§ 9884.8; 3356.

Acknowledgment of Notice and Consent § 9884.9

Q. When a customer gives oral consent to additional repairs, must I always write the complete notation on the final invoice, the same as on the work order?

A. Yes, unless you get the customer's signature or initials on a separate “Acknowledgment of Notice and Consent” with the following language:

“I acknowledge notice and oral approval of an increase in the original estimated price.”

(Customer signature or initials)

(When using the “Acknowledgment of Notice and Consent,” the shop **must** document any revisions of the original estimate on the work order. § 9884.9.)

Estimate to Tear Down, Inspect, Report, and Reassemble

§§ 9884.9; 3353.

1. What is a “Teardown Estimate?”

An estimate you write when you have to take apart a component (e.g., engine, brake system) to diagnose the problem.

2. What must be written on the Teardown Estimate?

- The cost of the teardown, including reassembly in case the customer decides not to have the repairs done, and the cost of items such as gaskets, seals, and o-rings—items normally destroyed by disassembly.
- The maximum time it will take to reassemble the vehicle in the event the customer decides not to have the repairs done. Maximum time is counted from the date of authorization of the teardown.

If you are tearing down an automatic transmission, you must write additional information on the Estimate to Tear Down. (See your booklet, *Laws and Regulations, Section 3361.1 Title 16, California Code of Regulations.*)

3. What if the vehicle cannot be restored to its former condition after teardown?

Tell the customer before starting the teardown, and write that information on the Teardown Estimate.

BBB AUTO REPAIR		789-0003		No. 84500	
123 Broadway				Toxic Waste No.	
Anytown, CA 23456				CAL 000 099 999	
BAR Number AA555555				DATE 2/21/99	
CUSTOMER NAME Bob Williams		HOME PHONE 555-2222		BUSINESS PHONE 555-4444	
ADDRESS 178 Bush St.		VEHICLE MAKE & MODEL 1996 Chevy Lumina			
CITY Anytown, CA 23456		LICENSE NO. CAL456		ODOMETER 75143	
PARTS (All Parts New Unless Otherwise Noted)			LABOR		
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR		CHARGE
			Coolant coming out		
			of exhaust		
			Remove cylinder head		
			Inspect & report		
ORIGINAL ESTIMATE \$ 120 ⁰⁰		AUTHORIZED BY Bob Williams		TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN 3 DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	
PHONE #		DATE		SUBTOTAL LABOR \$	
REVISED ESTIMATE \$		REASON		SUBTOTAL PARTS \$	
AUTHORIZED BY		ADDITIONAL COST \$		SALES TAX \$	
		<input type="checkbox"/> IN PERSON <input type="checkbox"/> PHONE #		TOTAL \$	

Specific job
(Teardown &
reassembly)

Estimated
price of
teardown &
reassembly

Customer
authorization

Maximum
time to
reassemble

Second Estimate After Teardown

4. What do I do after I inspect the torn down component?

Prepare a written estimated price for a specific repair job. You must list all parts required for such repair. Then contact the customer.

5. How is the repair work authorized?

In the same way that any other work is authorized. Get the customer’s signature, or, if the authorization is by phone, make the required notations on the work order.

After teardown, the customer must authorize any further work (including reassembly), whether or not the customer decides to have repairs done.

6. What do I do if the customer decides not to have repairs done?

Put the vehicle back together. You must do this within the maximum time period, as written on the Estimate to Tear Down. You can charge no more than the price on the Estimate to Tear Down, since the original estimate includes teardown and reassembly.

(Continued on page 10) Notation of second estimate authorization with telephone, date, & time

List of parts

Specific job (Teardown & reassembly)

Revised estimate

BBB AUTO REPAIR		789-0003	No. 84500	
123 Broadway			Toxic Waste No.	
Anytown, CA 23456			CAL 000 099 999	
BAR Number AA555555			DATE	2/21/99
CUSTOMER NAME		HOME PHONE	BUSINESS PHONE	
Bob Williams		555-2222	555-4444	
ADDRESS		VEHICLE MAKE & MODEL		
178 Bush St.		1996 Chevy Lumina		
CITY		LICENSE NO.	ODOMETER	
Anytown, CA 23456		CAL456	75143	
PARTS (All Parts New Unless Otherwise Noted)			LABOR	
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR	CHARGE
1	Valve grind set (PN 110)		Coolant coming out	
6	Spark plugs		of exhaust	
6 qts	Oil		Remove cylinder head	
1	Oil filter		Inspect & report	
1 gal	Antifreeze			
			Head gasket blown	
			Burned valve #6 cylinder	
			Grind valves & minor tune-up	
			Replace plugs	
ORIGINAL ESTIMATE	AUTHORIZED BY	TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN 3 DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED		SUBTOTAL
\$ 120.00	Bob Williams			LABOR \$
PHONE	DATE	TIME		SUBTOTAL
#				PARTS \$
REVISED ESTIMATE	REASON		ADDITIONAL COST	SALES
\$ 260.00	Valve grind & minor tune		\$ 140.00	TAX \$
AUTHORIZED	<input type="checkbox"/> IN PERSON		DATE	TOTAL
BY	<input checked="" type="checkbox"/> PHONE #		TIME	\$
Bob Williams	555-3333		2/22/99 10am	

(Continued from page 9)

Final Invoice After Teardown, Inspection, and Repair

7. What must be on the final invoice after teardown, inspection, and repair?

The final invoice must be a complete record of work done. It must show how the repairs were authorized, and the Teardown Estimate statement must be filled out.

If this is an automatic transmission repair, see pages 15 and 16. Also, refer to § 3361.1 Title 16, California Code of Regulations.

If the repair is a ball joint replacement, complete the documentation of measurement specifications as stated in § 3360.2 Title 16, California Code of Regulations.

Name, address, & registration #

BBB AUTO REPAIR		789-0003	No. 84500	
123 Broadway			Toxic Waste No.	
Anytown, CA 23456			CAL 000 099 999	
BAR Number AA555555			DATE	2/21/99
CUSTOMER NAME Bob Williams		HOME PHONE 555-2222	BUSINESS PHONE 555-4444	
ADDRESS 178 Bush St.		VEHICLE MAKE & MODEL 1996 Chevy Lumina		
CITY Anytown, CA 23456		LICENSE NO. CAL456	ODOMETER 75143	
PARTS (All Parts New Unless Otherwise Noted)			LABOR	
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR	CHARGE
1	Valve grind set (PN 110)		Coolant coming out	
6	Spark plugs		of exhaust	
6 qts	Oil		Remove cylinder head	
1	Oil filter		Inspect & report	
1 gal	Antifreeze			
			Head gasket blown	
			Burned valve #6 cylinder	
			Grind valves & minor tune-up	
			Replace plugs	195 ⁰⁰
Subtotals		ORIGINAL ESTIMATE \$ 120 ⁰⁰	AUTHORIZED BY Bob Williams	TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN 3 DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED
Sales tax		PHONE	DATE	TIME
		#		
		REVISED ESTIMATE \$ 260 ⁰⁰	REASON Valve grind & minor tune	ADDITIONAL COST \$ 140 ⁰⁰
Notation of second estimate authorization with telephone, date, & time		AUTHORIZED BY Bob Williams	<input type="checkbox"/> IN PERSON <input checked="" type="checkbox"/> PHONE #	DATE 2/22/99
			TIME 10am	TOTAL \$ 255 ²⁹

Yes, *unless* you get the customer's authorization to make a change in the method of repair or parts supplied.

Customer authorization

Final Invoice § 3353(c)

Q. If the estimate is itemized, how can I change it?

- A. Contact the customer. If the customer agrees to the change, write a description of the change and any change in price. Make a notation of the date, time, name of the customer, and telephone number called, if authorized by phone.

This information must be on the work order and on the final invoice. The final invoice must also contain a list of parts installed, with a price for each item.

For further information on itemized estimates, refer to BAR's autobody booklet *Write It Right: A Guide for the Autobody Repair Dealer*.

BBB AUTO REPAIR 123 Broadway Anytown, CA 23456		789-0003		No. 84500	
BAR Number AA555555				DATE <div style="text-align: right;">2/23/99</div>	
CUSTOMER NAME Jo Ann Williams		HOME PHONE 555-1224		BUSINESS PHONE 555-1111	
ADDRESS 1020 West St		VEHICLE MAKE & MODEL 96 Camaro			
CITY Anytown, CA 23456		LICENSE NO. 234ABC		ODOMETER 62034	
PARTS (All Parts New Unless Otherwise Noted)			LABOR		
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR		CHARGE
	Repair per attached insurance company estimate #7844				
	Insurance Claim #235542-783				
	New bumper unavailable—customer authorized used				
	bumper for \$50 less				
1	Used rear bumper	85 ⁰⁰			
ORIGINAL ESTIMATE \$ 983 ²⁴		AUTHORIZED BY <i>Jo Ann Williams</i>		TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN <u>3</u> DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	
PHONE DATE TIME #				SUBTOTAL LABOR \$ 848 ²⁴	
				SUBTOTAL PARTS \$ 85 ⁰⁰	
REVISED ESTIMATE \$ 933 ²⁴		REASON Used bumper		SALES TAX \$ 6 ⁵²	
AUTHORIZED BY Jo Ann Williams		<input type="checkbox"/> IN PERSON DATE <input checked="" type="checkbox"/> PHONE # 555-1111 2/28/99 11am		TOTAL \$ 939 ⁸³	

Notation of second
estimate authorization with
telephone, date, & time

Work Order § 3353(d)

1. What are “Unusual Circumstances?”

Situations when the customer can't be there to sign the work order. The car may have been towed in, or the driver may have left it at the shop before or after business hours.

2. How do I get the customer's authorization under "Unusual Circumstances?"

- a. Prepare a written estimate before any work is done, including teardown.
- b. Contact the customer for authorization.
- c. Make a notation on the work order showing:
 - Name of customer
 - Date
 - Time
 - Telephone number called, if any
- d. Make the same notation on the invoice, or use the “Acknowledgment of Notice and Consent.” (See page 7.)

In the example shown, you will be preparing a revised estimate after you have diagnosed the problem. After you receive the customer's authorization, make a notation of the date, time, person authorizing repair, and telephone number called, if any.

BBB AUTO REPAIR		789-0003		No. 84500	
123 Broadway					
Anytown, CA 23456					
BAR Number AA555555				DATE 2/23/99	
CUSTOMER NAME Alice Brown		HOME PHONE 555-8529		BUSINESS PHONE None	
ADDRESS 1350 Elm St		VEHICLE MAKE & MODEL 94 Mazda Miata			
CITY Anytown, CA 23456		LICENSE NO. 659TAW		ODOMETER 53277	
PARTS (All Parts New Unless Otherwise Noted)		LABOR			
QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR		CHARGE
			Tow in		
			Engine quit running		
			Diagnose no-start condition		
			Report to customer		
ORIGINAL ESTIMATE \$ 25.00		AUTHORIZED BY Alice Brown		TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN _____ DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED	
PHONE # 555-8529	DATE 2/23/99	TIME 9am			SUBTOTAL LABOR \$
REVISED ESTIMATE \$	REASON		ADDITIONAL COST \$		SUBTOTAL PARTS \$
AUTHORIZED BY			SALES TAX	\$	
			TOTAL	\$	

Automatic Transmission Repair

\$ 3361.1

14

Name & address	BBB AUTO REPAIR 123 Broadway Anytown, CA 23456		789-0003	No. 84500 Toxic Waste No. CAL 000 099 999
	Registration # BAR Number AA555555		DATE 2/21/99	
Itemized list of parts	CUSTOMER NAME Connie Consumer	HOME PHONE 555-7448	BUSINESS PHONE 555-7825	
	ADDRESS 3825 Treemore St.	VEHICLE MAKE & MODEL 1994 Pontiac Sunbird		
	CITY Hopeville, CA 93456	LICENSE NO. CLNAIR	ODOMETER 62456	
	PARTS (All Parts New Unless Otherwise Noted)		LABOR	
	QTY	DESCRIPTION OF PARTS	PRICE	DESCRIPTION OF LABOR
	1	Trans o/haul kit (PN 221)	143 ⁰⁰	Transmission slips when shifting External inspection & diagnosis,
	1	Drum	139 ⁰⁰	including pressure & TV cable adjustments
	1	Exchange converter	242 ⁰⁰	1. Fluid level-good 2. TV cable-OK 3. Manual linkage-OK
	8 qts	Trans fluid @ \$2	16 ⁰⁰	4. Road test confirm 5. Pressure test 45 psi-Normal 75-85
				Tear down & inspect transmission
				Rebuild transmission
				Replace converter
				Toxic waste charge
Subtotals				2 ⁰⁰
Sales tax	ORIGINAL ESTIMATE \$ 45 ⁰⁰		AUTHORIZED BY <i>Connie Consumer</i>	
	TEARDOWN ESTIMATE: I UNDERSTAND THAT MY VEHICLE WILL BE REASSEMBLED WITHIN 3 DAYS OF THE DATE SHOWN ABOVE IF I CHOOSE NOT TO AUTHORIZE THE SERVICES RECOMMENDED		SUBTOTAL LABOR \$ 506 ⁰⁰	
Notations for authorization of second estimate	PHONE #	DATE	TIME	SUBTOTAL PARTS \$ 540 ⁰⁰
	REVISED ESTIMATE \$ 294 ⁵⁰	REASON Tear down & inspect		ADDITIONAL COST \$ 249 ⁰⁰
	AUTHORIZED BY Connie Consumer	<input type="checkbox"/> IN PERSON	DATE	TIME
	<input checked="" type="checkbox"/> PHONE #555-7825	2/22/99	10am	TOTAL \$ 1087 ⁸⁵
FINAL AUTHORIZATION				
REVISED ESTIMATE \$ 1050 ⁰⁰		REASON Rebuild transmission		ADDITIONAL COST \$ 1005 ⁰⁰
AUTHORIZED BY Connie Consumer		<input type="checkbox"/> IN PERSON	DATE	TIME
		<input checked="" type="checkbox"/> PHONE #555-7825	2/23/99	11am

Automatic Transmission Repair § 3361.1

A well-maintained automatic transmission can last a long time. When problems do occur, repairs may be costly. If repairs are necessary, your customer faces decisions such as: “Should the transmission be repaired or replaced? Should the torque converter be replaced?”

The flow chart on pages 16-17 was designed to help guide you through these complex questions. Use it as your “road map” for step-by-step instructions when performing automatic transmission work.

As the expert, you need to be careful before you agree to replace, repair, rebuild, remanufacture, recondition, or overhaul an automatic transmission. Avoid confusion by explaining all available options to your customer. Be sure to evaluate the situation and explain.

First, do an external inspection before removing the transmission. Then inform the customer if an external repair or adjustment can reasonably correct the transmission problem. However, if the customer requests a rebuilt or exchanged transmission and does not want an external inspection, be sure to document that on the invoice.

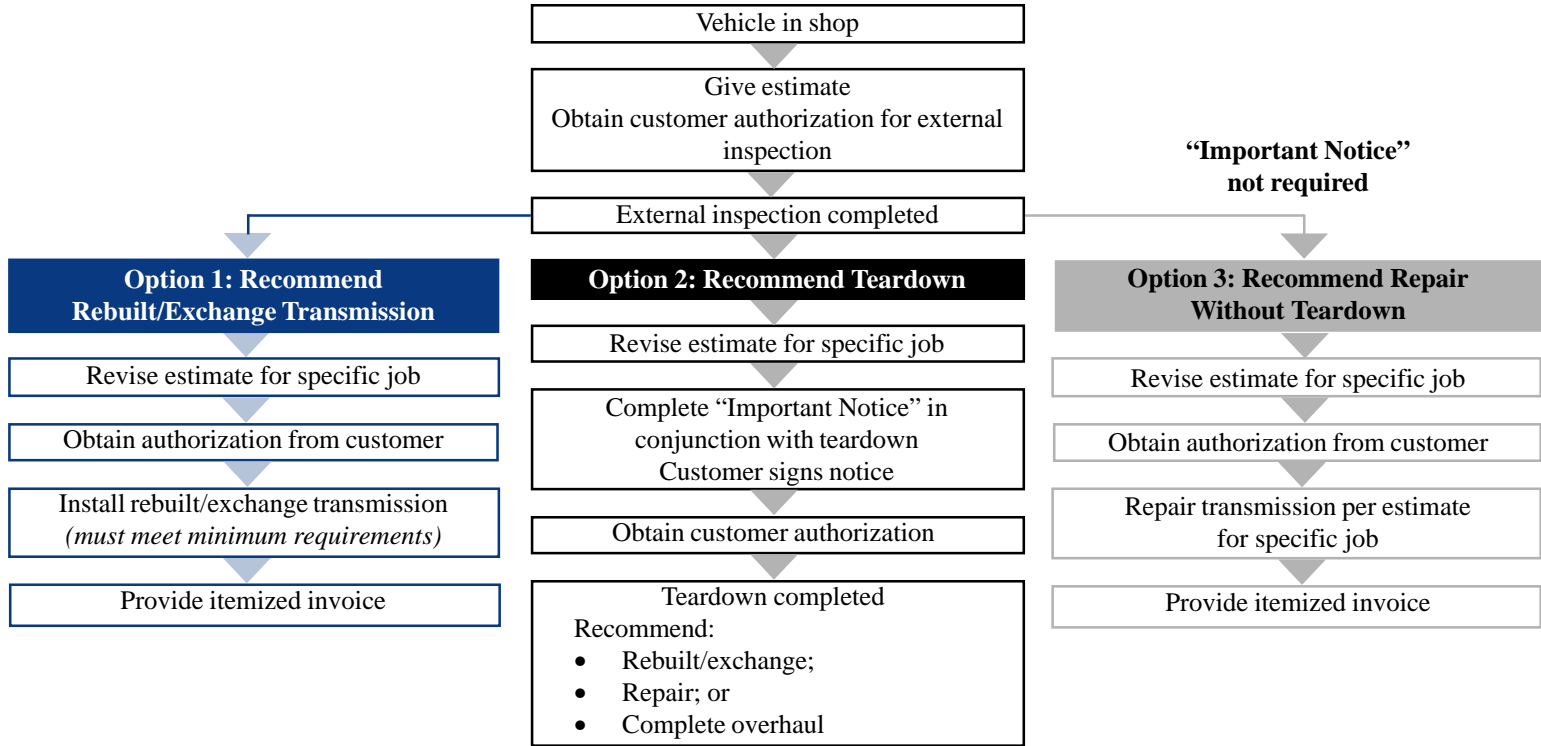
By law, the customer must be notified and must authorize any further repairs if external adjustments will not correct the problem.

If a teardown is performed, the “Important Notice” section (either on the invoice or a separate attachment) must be completed as stated in *Section 3361.1 Title 16, California Code of Regulations*. This information must include cost estimates and a time limit for reassembly.

After the external inspection, if the customer authorizes the shop to repair the specific malfunction, install a rebuilt exchange, or rebuild the customer’s transmission for a specific price, and no teardown is performed, it is not necessary to complete the “Important Notice.”

Automatic Transmission Repair: A Road Map To Better Understanding—Part I

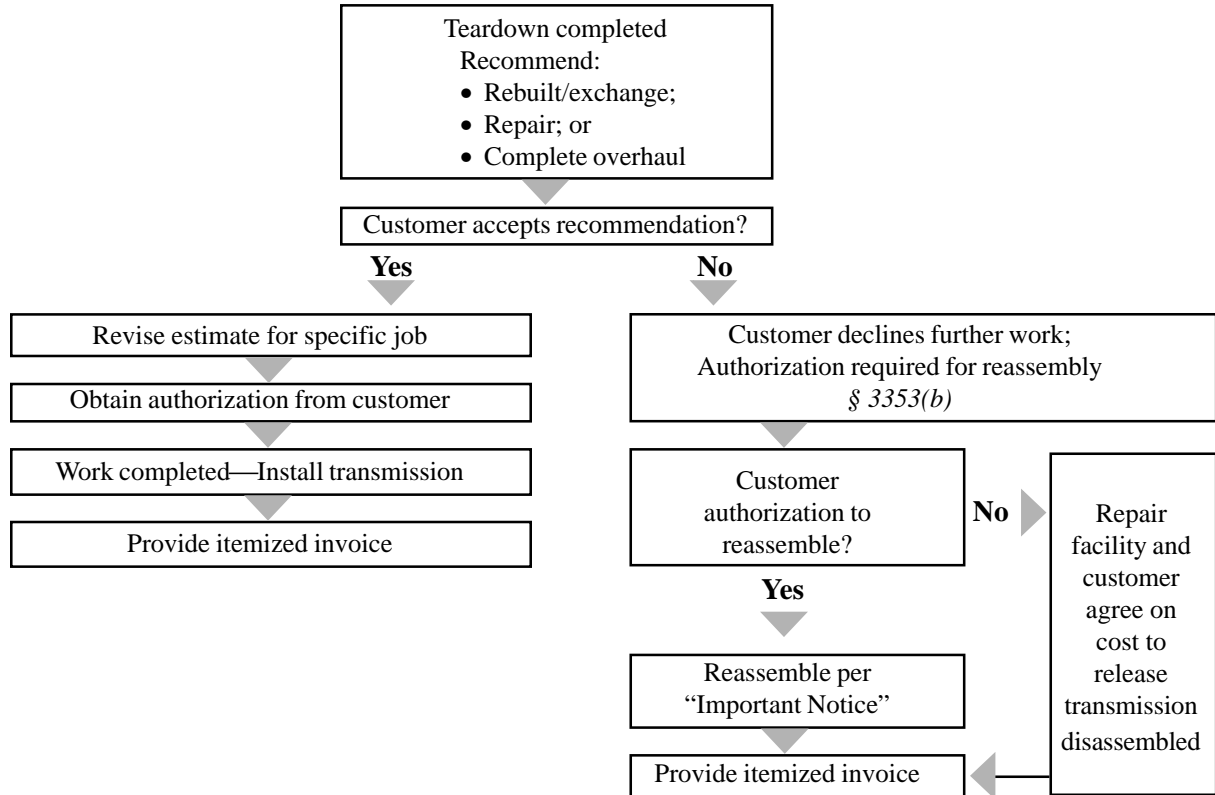
- Rebuilding of customer's transmission for specific price may also be performed without teardown.
- Complete "Important Notice" only when teardown is performed (see § 3361.1).
- Rebuilt/exchange transmission may be sold without teardown.



(Option 2 continued on next page)

Automatic Transmission Repair: A Road Map To Better Understanding—Part II

(Option 2 continued)



Frequently Asked Questions & Answers

For what reasons can my registration be revoked? §9884.7.

By law, a dealer's registration may be revoked for any of the following acts or omissions:

- Making untrue or misleading statements.
- Letting a customer sign a work order that does not state the repairs or the odometer reading.
- Failing to give a customer a copy of a signed document.
- Fraud.
- Gross negligence.
- Failure to comply with the laws and regulations.
- Willful departure from or disregard of accepted trade standards for good and workmanlike repair.
- Making false promises in order to get a customer to authorize service.
- Having repairs done by someone else without the knowledge or consent of the customer (unless the customer cannot reasonably be notified).

Is it acceptable to sublet repair work to another shop?

§§ 9884.7(1)(i); 9884.9(b); 3359.

Yes. If you are planning to sublet work, include a statement of that fact with the written estimated price. Get the customer's consent, unless the customer cannot reasonably be notified.

If I sublet work, am I responsible for it? §§ 9884.9(b); 3359.

Yes. You are responsible for the work, just as you would be if you or your employees did it.

Do I have to return replaced parts to a customer?

§ 9884.10.

Yes, if the customer asks for them at the time the work order is placed. However, there are exceptions. For example, you do not have to return a part if it has to go back to the supplier under a warranty arrangement. You do, however, have to offer to show the part to the customer.

What must a guarantee or warranty show? § 3376.

The guarantee or warranty must state in writing and show the following:

- What is covered and what is not covered.
- The term, time, or mileage for which the guarantee is valid.
- What the customer must do to have the guarantee honored (return the part, pay a service charge, etc.).
- What the guarantor will do (repair, replace, etc.).
- Whether the guarantor or the customer has any options as to what may satisfy the guarantee.
- Name and address of the guarantor.
- Whether the guarantee is prorated (i.e., adjusted for time or mileage).

Can I charge for shop supplies? § 3356(b).

No. You may not charge for shop supplies. You may charge only for miscellaneous parts used on the customer's vehicle. These parts (such as carburetor sprays, brake cleaners, etc.) must be itemized on the invoice.

Has BAR set standards for any types of auto repairs?

§§ 3360.1 – 3362.1.

Yes. Standards have been set in three areas: ball joints, automatic transmissions, and engine changes. If you perform work in these areas, you must follow the standards in *Sections 3360.1 through 3362.1 of Chapter 33, Title 16, Article 8 of the California Code of Regulations*. (See BAR's booklet, *Laws and Regulations*.) The sections noted above apply to "accepted trade standards" for good and workmanlike automotive repair as performed by automotive repair dealers. The following key points of these sections are listed below:

General Requirements—Ball Joints § 3360.2

- Measurement of ball joint wear or looseness must be made by a measuring instrument specifically designed and manufactured for this purpose.
- The degree of wear or looseness of the ball joint replaced must be recorded on the customer's invoice.
- Manufacturer's maximum allowable wear or looseness must be stated.

Automatic Transmissions § 3361.1

Automotive repair dealers engaged in the repair, sale, and installation of automatic transmissions in vehicles shall be subject to the following minimum requirements:

- Perform an external inspection to determine whether or not the replacement or adjustment of any external part or parts will correct the specific malfunction of the automatic transmission.

- A prescribed amount of work must be performed on an automatic transmission for it to be described as "rebuilt," "remanufactured," "reconditioned," or "overhauled." (See *Laws and Regulations* booklet for specific details.)
- The torque converter is considered to be part of the automatic transmission and is required to be made serviceable before a "rebuilt" transmission is installed. Like the transmission, the converter requires a prescribed amount of work to be performed and must also be pressure-tested.
- If it is necessary to do a teardown and inspection in order to prepare a written estimated price for the required repairs, the "Important Notice" shall be completed.
- The final invoice shall include a description of the labor performed and parts supplied. All hard parts replaced, if any, shall also be recorded.

Engine Changes § 3362.1

An automotive repair dealer shall not make any motor vehicle engine change or repairs that would degrade the effectiveness of the original emissions control system and/or components thereof.

If you need further information, consult the BAR booklet, *Laws and Regulations Relating to Automotive Repair Dealers, Licensed Official Stations, and Licensed Smog Check Stations*; call DCA's toll-free information line at 1-800-952-5210; or visit BAR's website at www.smogcheck.ca.gov.



DEPARTMENT OF CONSUMER AFFAIRS

Bureau of Automotive Repair

10240 Systems Parkway

Sacramento, CA 95827